

MSC System Updates- Fall 2018

BLUEcloud Analytics

Director's Station Termination

In-person training was offered for BLUEcloud Analytics (BCA) during the Spring 2018 Membership Meeting and at the 2018 Fall Workshops. Additional training materials are available on the MSC Knowledge Base, including a printable guide and a recorded tutorial. Access to Director's Station will be concluded on January 1, 2019, so we encourage you to start the transition to BCA now. If you need help migrating existing reports in DS to BCA, please open a support ticket.

Public Library Statistics

The MSC system administrators supplied the Montana State Library with FY 18 statistics for all public library members. These statistics included circulation, collection counts, registered borrows, and transit stats (for sharing libraries). The data will be available to you as you submit your statistics through the library directory. For the most accurate statistics, consistent data-entry procedures are essential. We strongly encourage all public libraries to use Item Category 1 for format type (e.g. book, DVD, paperback) and Item Category 2 for department (e.g. juvenile, adult). Both categories are used to calculate annual public library statistics. If you would like assistance batch filling these categories for your collection, please open a support ticket.

Enterprise

Test Server

The MSC Executive board approved the purchase of a SaaS Enterprise test server. In the future, the new test server will allow us to complete upgrade testing and fine-tuning before applying changes to our live, production server. When testing new configurations, widgets, or CSS, we can apply the changes to the test server first so that minimal unscheduled indexing is performed on our production server.

5.0 Upgrade

Enterprise was upgraded to the latest version on September 20, 2018. Most changes were related to infrastructure and improved system stability.

Help Desk Portal

Ticket System & Knowledge Base

The MSC will be moving to a new ticket system and training will be provided after configuration is complete. Users will be able to log in with an email address to see previously submitted tickets. The new help desk portal will include a browsable knowledge base that will automatically suggest articles based on ticket subjects.

On-Call Hours

MSL Policy Change

With the move to SaaS, there has been a complete cessation of emergency calls on weekend hours (zero calls over the last year). Moreover, system critical support is monitored and attended to by SirsiDynix SaaS staff, which includes 24/7 care using teams positioned globally. Based on this information, the MSC system administrators will discontinue on-call hours during the weekend and after 5:00 p.m.

This change will increase MSC system administrator efficiency as on-call time is currently flexed and results in staff time off during the week. The staff will continue to be available via telephone and through the ticket system during Montana State Library open hours (8:00 a.m. to 5:00 p.m., M-F) and on an as-needed basis during the weekend/after hours for special circumstances like major system updates. The MSC system administrators have posted training on the available offline features in Workflows. Training materials can be accessed via the Knowledge Base page on msc.msl.mt.gov.

Technical Services

OCLC Reclamation Project

The MSC will undergo a reclamation project with OCLC in Spring 2019 to reconcile local holdings in Symphony with OCLC holdings in WorldCat. This will involve a complete removal of OCLC holdings and a reloading of the entire Symphony holdings to WorldCat. Because holdings will not be in OCLC there will be some disruption of ILL lending for MSC libraries. Once the reclamation is completed, holdings in OCLC should accurately reflect MSC holdings. MSC system administrators' audit last spring of the scan-delete process demonstrated some inconsistencies in the monthly uploads for serials, titles that have been transferred within Symphony, records added by a few new MSC libraries, and records lacking OCLC control numbers in the 035 tag. Scan-deletes used to occur without any additional costs to the members, but reclamation projects have an associated cost over and above the Group Services contract. MSC system administrators recommended that the MSC undergo this one-time reclamation of holdings, using vacancy savings, which was endorsed by the CMC and approved by the Executive Board. Going forward, MSC system administrators will continue to send monthly uploads and discards to OCLC but will no longer facilitate annual scan-deletes. The MSC trainer will be working with members to ensure a smooth transition to a catalog without annual scan-deletes. There may be some changes to the Discard/Delete and transferring procedures. This process will not cause WorkFlows or Enterprise downtime, but OCLC holdings will be affected.

Record Hygiene & Cleanup Projects

MSC system administrations will begin to flag duplicate and substandard bibliographic records with an Item Cat 5 of REVIEW. Libraries will be sent training materials and lists of records to transfer or update. At this time, record cleanup will be on an entirely voluntary basis. This change is being initiated in order to ensure overall record quality and integrity of the bibliographic database as the CMC and Executive Board have determined contract catalog cleanup projects are not financially feasible. These cleanup projects will help ensure more accurate holdings for the OCLC Reclamation project.

Centralized Acquisitions Pilot

Due to funding and staffing constraints, the end of the Centralized Acquisitions Pilot has been extended from this September to a mid-point of January 2019 and the earliest possible completion at the start of FY2020. The deliverable of the pilot will remain a standardized method for on-boarding libraries in the Acquisitions Module, pre-processing standards, and the future MSC Standardized Acquisitions Procedures. System changes made as a result of this pilot will only affect libraries wishing to use the Acquisition module and/or vendor-supplied records and/or pre-processing going forward. Use of these features will be opened to other MSC libraries wishing to conform to the new standards after the successful conclusion of the pilot.

Authority Control

MSC system administrators are working with the CMC and SirsiDynix to gain greater clarity about the MSC's quarterly authority record updates. There should be few disruptions to cataloging functions during this process. The goal is to reduce the overall UNAUTHORIZED name and subject authorities in the database, and to determine if additional services are possible through our contract with SirsiDynix.

System Configuration

User Profiles and User Categories Audit

The User Categories audit and standardization is complete. If the current options for user categories are not fulfilling your statistical needs, please open a support ticket. The streamlining of User Profiles is still underway as it is more complex – you will be notified if adjustments to your User Profiles are necessary. The current User Category field designations and options are posted on the MSC website.

Scheduled Scripts on the SaaS Server

The migration of scheduled scripts to Workflows and BCA reports is still underway, but nearing completion. If your library uses one of the remaining scripts, you will be notified to help test the Workflows report and confirm that the needed functionality is identical before any changes to the scripts are made.

Symphony & Workflows 3.5.3.0 GA2 Upgrade

Symphony and Workflows were upgraded to the latest version on September 11, 2018. Web Services upgrades were completed at the same time. This upgrade provided additional functionality on the configuration side as well as bug fixes and patches.

Emailed Finished Reports

MSC system administrators audited reports that were being emailed after the October 2017 announcement that we would be phasing out this practice. A large number of these reports were being emailed to individuals no longer working for MSC libraries. It is contrary to good security protocols and privacy laws to send this data to persons who are not associated with the involved library, but we received feedback that having finished reports directly emailed is a function that many MSC member librarians value. MSC system administrators have investigated various options and—in order to keep emailed reports possible—are establishing a policy that the addresses receiving reports must not be an individual email account associated with a single person. The emails must be a generic library, department, or shared account that a library will not lose access to because of staffing and personnel changes, for example circulation@samplelibrary.org or library@sample.com. Additionally, no reports

that contain personally identifiable information (PII) will be emailed to library staff, as email is not secure. This will not affect emailed overdue notices that patrons receive as they have opted into that service. MSC system administrators will begin transitioning existing emailed reports to allowable addresses immediately, and no new emailed reports will be set up for individual email accounts. As of February 1, 2019, individual email accounts will no longer receive finished reports.

NEVER Due Dates for Non-System Users

MSC system administrators have been working since October 2017 to phase out NEVER due dates for non-system users. System users such as MISSING, DISCARD, etc. have processes in place to ensure that items with NEVER due dates do not remain charged to them indefinitely. A charge (checkout) is a temporary status and leaving items permanently charged can cause errors and system issues over time. This phaseout has mostly affected school libraries, as many used NEVER due dates for permanent checkouts to teachers and faculty. We have created an alternate process for those items and are working with schools to implement it. In the meantime, MSC system administrators will be setting all non-system user NEVER due dates to an end-of-school-year date in July 2019, which will prevent those items from becoming overdue or being removed from the system through the Process Long Overdue maintenance. If you have a circulation rule set allowing non-system users to have NEVER due dates, we will notify you before we adjust those settings.